Version: v0.4

Date: 19 July 2013

User Guide

Table of Contents

PRODUCT OVERVIEW 3

EASY TO USE, EASY TO UNDERSTAND 3
REQUIREMENTS: 3

HOW TO START? 4

REGISTRATION 4
START THE APPLICATION 6

USER INTERFACE 8

MENU 10

MODEL TYPES 11

PROCESS MODEL 12

MODEL ELEMENTS 12
SAMPLE MODELS 14
USING THE PROCESS MODEL PROPERTY BOX 15

MERGE MODEL 19

MODEL ELEMENTS 19
SAMPLE MODELS 19

ORGANIZATIONAL CHART 21

MODEL ELEMENTS 21
SAMPLE MODELS 22

IT MODEL 24

MODEL ELEMENTS 24
SAMPLE MODELS 25

DOCUMENT MODEL 26

MODEL ELEMENTS 26
SAMPLE MODELS 26

PRODUCT MODEL 27

MODEL ELEMENTS 27
SAMPLE MODELS 27

CREATING A POLICY DOCUMENT 28

CREATE NEW DOCUMENT 28
DOCUMENT EDITOR 29
INSERT EXISTING MODELS INTO DOCUMENTS 29
EXPORT DOCUMENTS 30

TRICKS AND TIPS 31

PAGE SETUP 31
PRINT OR EXPORT 31
SELECT MULTIPLE ELEMENTS 31
DRAWING CONNECTORS 31

MORE TO COME 32

PRODUCT OVERVIEW

The idea behind Pruexx, was to create a platform that allows users to develop easily understandable business process descriptions, that can be used as policy documents. Because a policy document usually target a whole organization, or its highlighted segments, theses policy descriptions should be intuitively understandable.

Easy to use, easy to understand

Pruexx is a modelling tool that offers easy modelling, and simple modelling objects that are easy to understand by anyone.

In this approach:

- We limited the number of used objects to as few as possible
- Do you familiar with BPMN? The modelling method is BPMN like, but simplified as much, as possible. The goal of Pruexx is to provide an intuitively understandable model structure for every user.

Requirements:

HTML5 ready browser:

- Chrome (tested)
- Safari 5.1
- Opera 11
- Firefox 4+ (tested)
- Internet Explorer 9 (tested)

Recommended screen resolution: min: 1024x768

How to start?

Registration

Log in
PRUEXX
Home
Product
Pricing
How To
Shop
Start Using Pruexx
Plan Your Business!
Use PRUEXX, the ultimate process modelling tool!
GIVE IT A TRY
(it's free)
Features
Good ol' Cloud
Pruexx keeps all your data in the cloud, so you and your collegues can reach it anytime. Anywhere.
Your Data is Secure!
Your data is your data. We follow the highest standards to protect it for you.
Are You a Team Player?
Collaboration is the base of our product. Pruexx gives you all the tools to help you work together on models.
Smooth Integration
You can export your models into PDF and DOC format. And it works like a charm.
Log In
e-mail
password
Keep me logged in
I forgot my password
LOG IN
Latest News

If you are a new user, welcome! You have to register yourself to start using Pruexx!

To register yourself please click on either orange button: „Give it a try" or „Start using Pruexx"

Personal
Corporate
The choice is yours!
Currently only Personal user is available.
The choice will be yours!
We work on it!
First name
Research_User
Enter your first name!
Last name
InvenQ
Enter your last name
E-mail address
invenq.research@gmail.com
Enter your e-mail address! It should be valid, because we will send the confirmation e-mail there!
Password
Re-type password
You have to enter your password twice!
I have read and agreed the Terms and Conditions.
Click to accept the Terms and Conditions!
Send Registration
Ready? Click on in!

Start the application

Log in
PRUEXX
Home
Product
Pricing
How To
Shop
Start Using Pruexx
Plan Your Business!
Use PRUEXX, the ultimate process modelling tool!
GIVE IT A TRY
(it's free)
Features
Good ol' Cloud
Pruexx keeps all your data in the cloud, so you and your collegues can reach it anytime. Anywhere.
Your Data is Secure!
Your data is your data. We follow the highest standards to protect it for you.
Are You a Team Player?
Collaboration is the base of our product. Pruexx gives you all the tools to help you work together on models.
Smooth Integration
You can export your models into PDF and DOC format. And it works like a charm.
Log In
e-mail
password
Keep me logged in
I forgot my password
LOG IN
Latest News

Congratulation, and welcome to our website! Thank you for trying out Pruexx!

If you have already registered yourself, just log-in., and start using Pruexx!

You can find 2 login windows on the screen, select the more comfortable one!

Launch Application
Research_User's profile
Log out
PRUEXX
Home
Product
Pricing
How To
Shop
Launch Application
Plan Your Business!
Use PRUEXX, the ultimate process modelling tool!
APPLICATION
(it's free)
Features
Good ol' Cloud
Pruexx keeps all your data in the cloud, so you and your collegues can reach it anytime. Anywhere.
Your Data is Secure!
Your data is *your* data. We follow the highest standards to protect it for you.
Are You a Team Player?
Collaboration is the base of our product. Pruexx gives you all the tools to help you work together on models.
Smooth Integration
You can export your models into PDF and DOC format. And it works like a charm.
Latest News

You can log out here

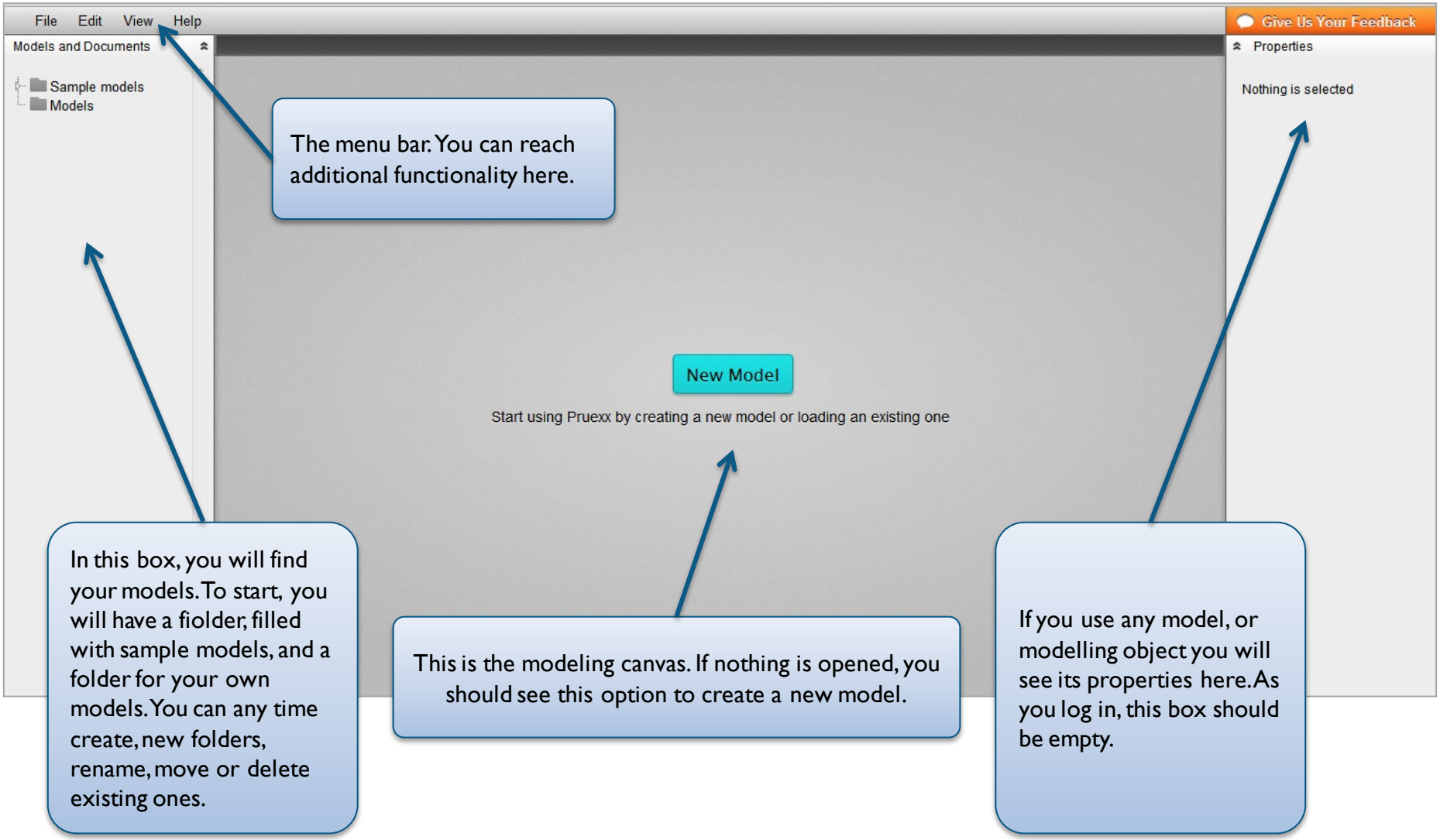
You can change your password here.

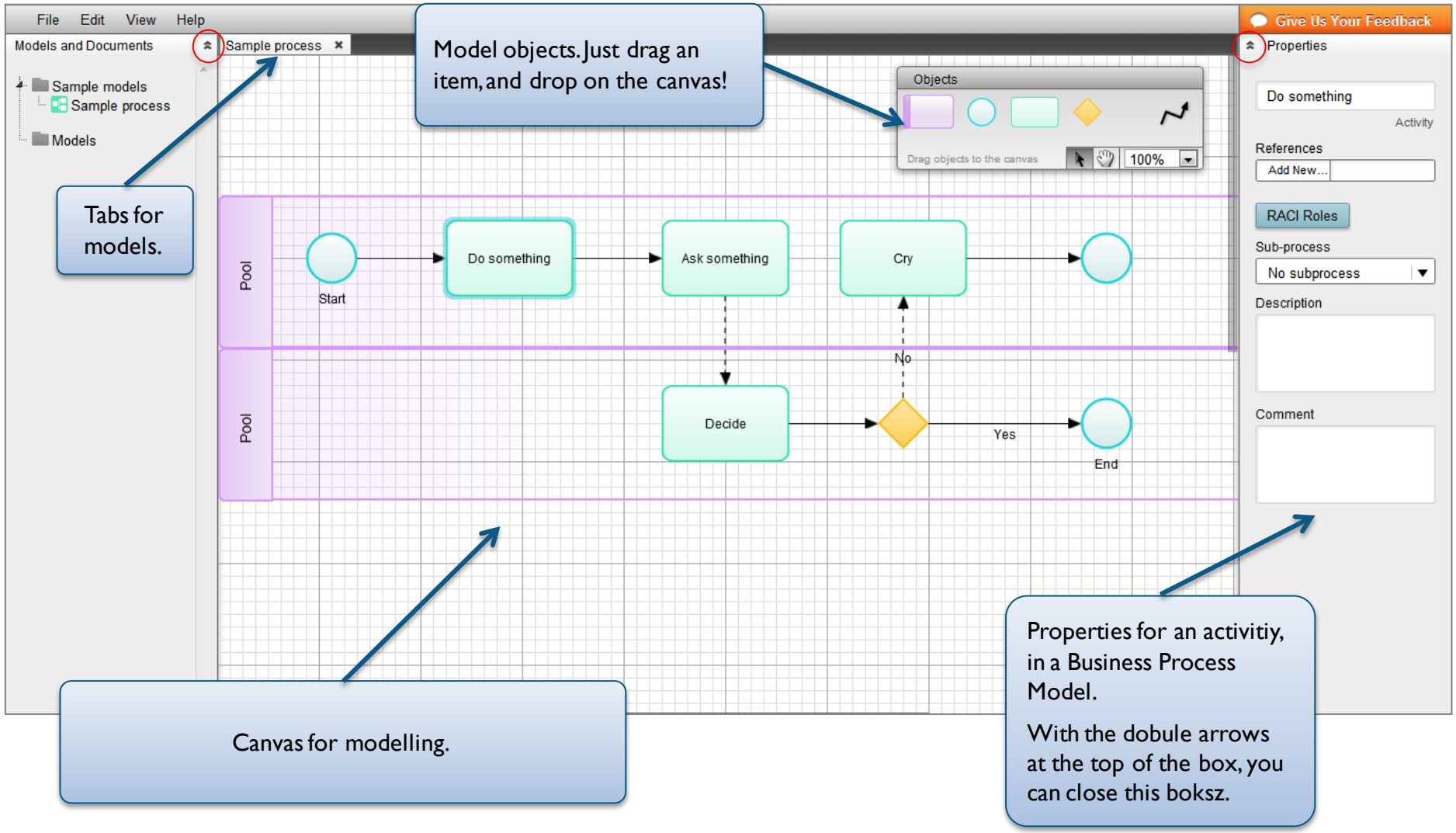
If you logged in, you are ready to start the application itself. Please note, the apperance of the start screen has changed.

You have three choices to do so!

Let's start Pruexx!

User Interface


File
Edit
View
Help
Give Us Your Feedback
Models and Documents
Sample models
Models
Properties
Nothing is selected
New Model
Start using Pruexx by creating a new model or loading an existing one
The menu bar. You can reach additional functionality here.
In this box, you will find your models. To start, you will have a fiolder, filled with sample models, and a folder for your own models. You can any time create, new folders, rename, move or delete existing ones.
This is the modeling canvas. If nothing is opened, you should see this option to create a new model.
If you use any model, or modelling object you will see its properties here. As you log in, this box should be empty.


File
Edit
View
Help
Models and Documents
Sample models
Sample process
Models
Sample process
Model objects. Just drag an item, and drop on the canvas!
Objects
Drag objects to the canvas
100%
Give Us Your Feedback
Properties
Do something
Activity
References
Add New...
RACI Roles
Sub-process
No subprocess
Description
Comment
Tabs for models.
Pool
Pool
Start
Do something
Ask something
Cry
No
Decide
Yes
End
Canvas for modelling.
Properties for an activitiy, in a Business Process Model.
With the dobule arrows at the top of the box, you can close this boksz.

Menu

In Pruexx, you will find the following menu items:

File	
New model	Create new model (process model, Process merging model, IT model, Organization model, Document model, Product model)
Open	Open model from the folder structure, with preview (preview will come only in the final version)
Save	Save the actual model. The tool saves automatically, so you cannot loose data, but a manual saves creates a new version baseline, where you can step back, if necessary.
Close	Close the actual model
Page Setup	Set paper size, orientation and margins.
Print	Print the selected model.
Export	Export to PDF
New Document	You can create a new policy document, where you can include any model in addition to the free document text. In the document you can use three levels of headings along with free text. Please check the reference how to include models
Language	Set language (Currently english and Hungarian are supported)
Logout	Leave Pruexx

View	
Grid	You can select, how the canvas can help your work: with lines or dots in the background to help positioning your objects, or with just offering a clear white canvas.
Snap to Grid	Snapping objects to grid. Or not.
Page Breaks	Show or hide page breaks.
Library	Show or hide library box (model folders and model names)
Properties	Show or hide properties box

Edit	
Undo	To withdraw your last action
Redo	To withdraw your last withdrawn action
Cut	Cut the selected object(s)
Copy	Copy the selected object(s)
Paste	Paste the selected object(s)
Select All	Select all objects on the canvas
Find	Find an object in the current or in all models

Account	
Profile	You can change your password, or delete your profile
Upgrade account	[Currently not working] Here you are able to upgrade your free account.
Previous transactions	[Currently not working] You can check your previous transactions.
Logout	Leave Pruexx

Help	
Search	Search in the manual
User manual	The whole manual itself
About Pruexx	Version number, publisher, etc.
Give Us Your Feedback	We do really appriciate it!
Keyboard Shorcuts	Keyboard shortcuts for Windows or Mac. Please mind the modelling window must be active to use the shortcuts.

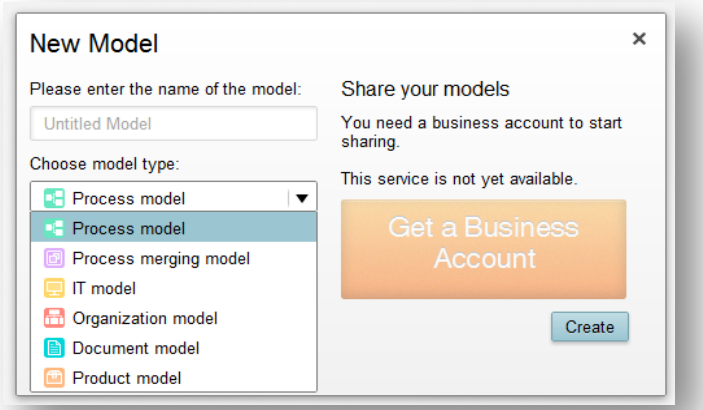
Model Types

You can create new models in the following ways:

1. Selecting “New model” from “File” menu.

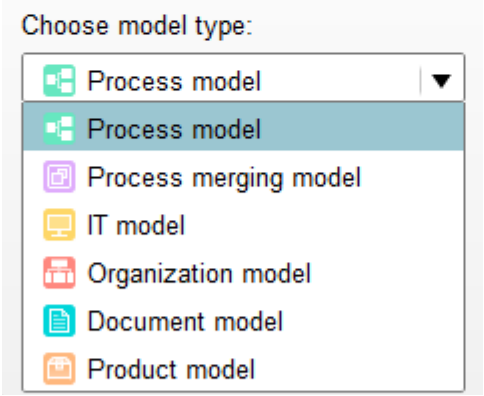
2. Right mouse click on a library you want to have your model or right mouse click on the model directory panel on an empty space

3. Left mouse click on the “New Model” button on an empty canvas (no model is opened)



By either ways you will get the following pop-up window:

In this window you should select the model type, and enter the name of the model. Collaboration is not available this time.



In Pruexx you can choose between the following models:

- **Process Model**: Used to model business processes and required resources.
- **Merge model**: Create overview models, and help the navigation among your models.
- **Organizational model**: to define the organizational structure, organizational units, positions and roles.
- **IT model**: To define the IT architecture, hardware (IT infrastructure), software (applications) and services (IT and business services).
- **Document model**: To model documents or document parts to add inputs and outputs to a process activity.
- **Product model**: To model products or product parts to add inputs and outputs to a process activity.

PROCESS MODEL

Model elements

Model object	Description
	Activity: For this object you can specify the following information in the properties window: - Name: Name of the activity - References - RACI Roles: - Sub-process: - Description: Content of the activity - Comment: Any other comment
	Subprocess: You can define a subprocess, if you specify a related process in the properties window. If a process arrives to a subprocess, the subprocess is called. After the subprocess is finished, the original process can continue.
Events	
	Standard event: In the properties box you can specify: Start, Middle, End or Other event. Events mark, that something happens in the process, and events may have impact on the process flow.
	Start and End events are used as marking the start of end of project. In addition you can name them as events to trigger a process, e.g.: evaluation is required, new customer arrived.

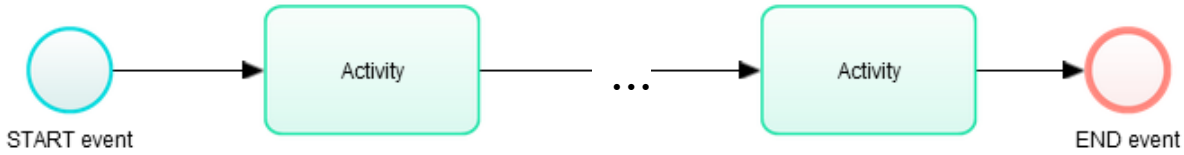
Gateways	
	Logical gateway that control the process flow and describe the routing logic of a process. In the properties box you can specify the type :Paralellity, XOR, Or, Complex.
	Parallelity gateway slipts the process into parallel process paths.
	XOR, and Exclusive decision: The process can continue in only one selected process path in a time.
	Or decision: The process can continue in one or more parallel process paths, based on the decision.
	Complex gateways describe the examination of complex synchronisation behaviour, based on the incoming conditions.
Other objects	
	Pool: Graphical representation of an organizational player, representing “responsibility for execution” (R of RACI) for a specified activity.
	Connector (line): Connects events, activities and gateways.

Sample models

Starting and ending a process

To start a process, use START event, as trigger.

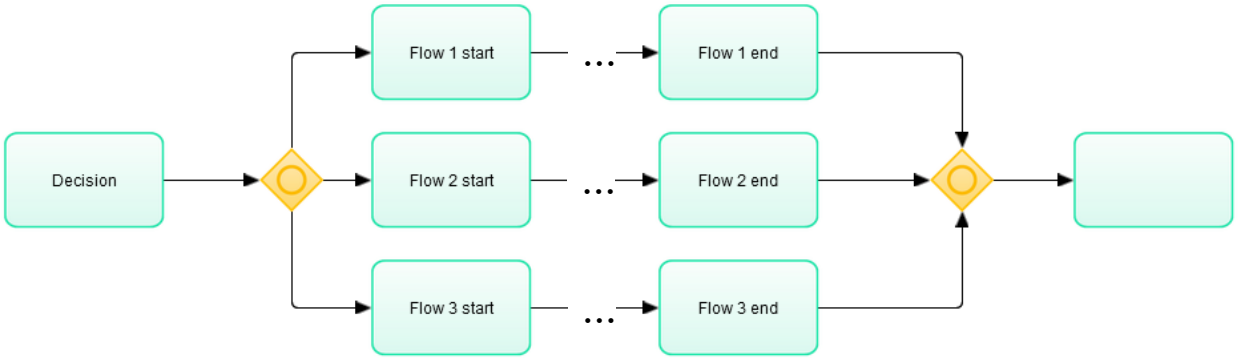
To mark the end of your process, use the END event.



Using gateways

A gateway object splits the sequence flow into two or more paths. These flow should be reunited with the same logical gateways that splits them.

The right sequence for using gateway is to use an activity that covers the decision, followed by the logical gateway.

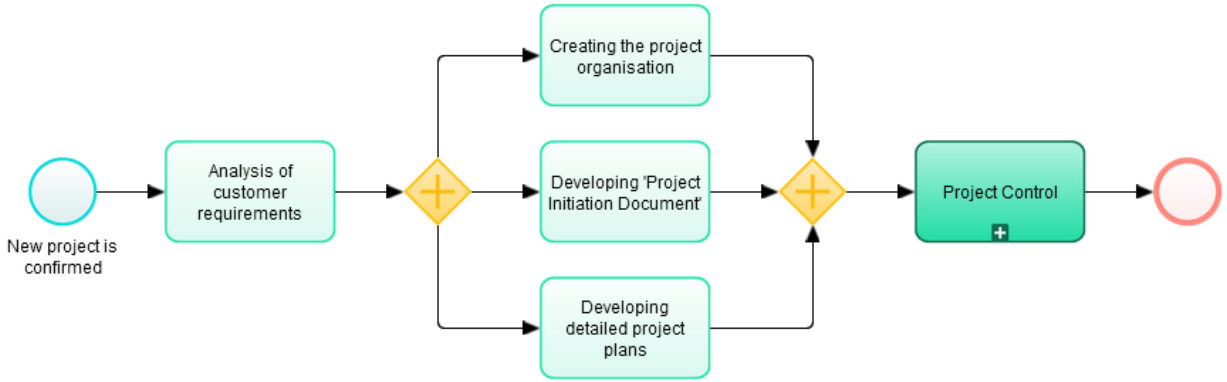


Project Management: start a new project

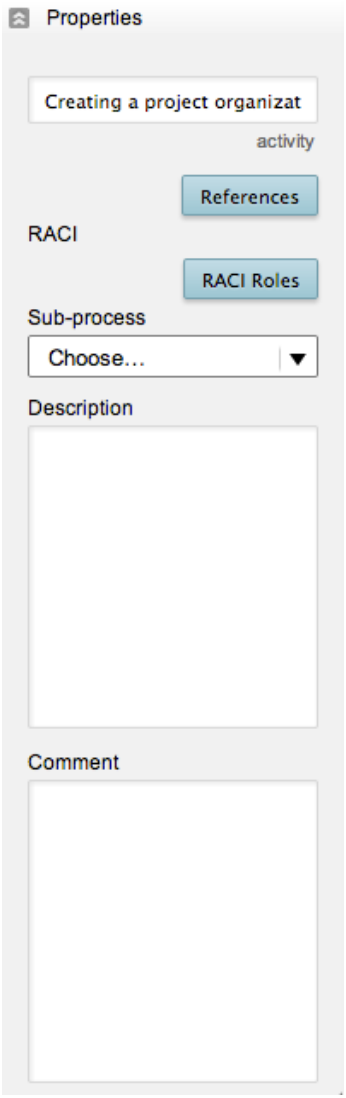
This very top level business process diagram illustrates every main element:

- Process start
- Gateway (paralellity)
- Subprocess
- Process ends

Please note, the second paralellity gateway indicates to wait, until all parallel flows have been finished.



Using the process model property box



For activities in the process model, you will find the most properties to set. Please click on an activity icon, and the properties window on the right side will be filled with the following information:

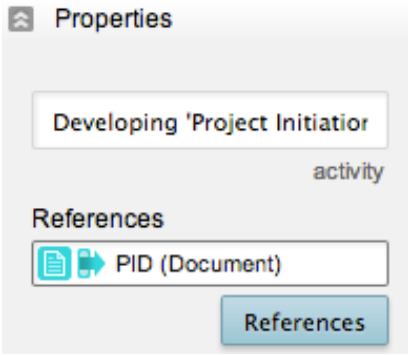
As text fields you can specify the name of an activity, a description and additional comments.

Under References you refer to:

- Used IT model elements (e.g. an activity us supported by an application, or requires a services)
- Input and output document
- Input and output product

You can set activity related responsibilities under RACI Rules.

You can link a sub process instead of activity.

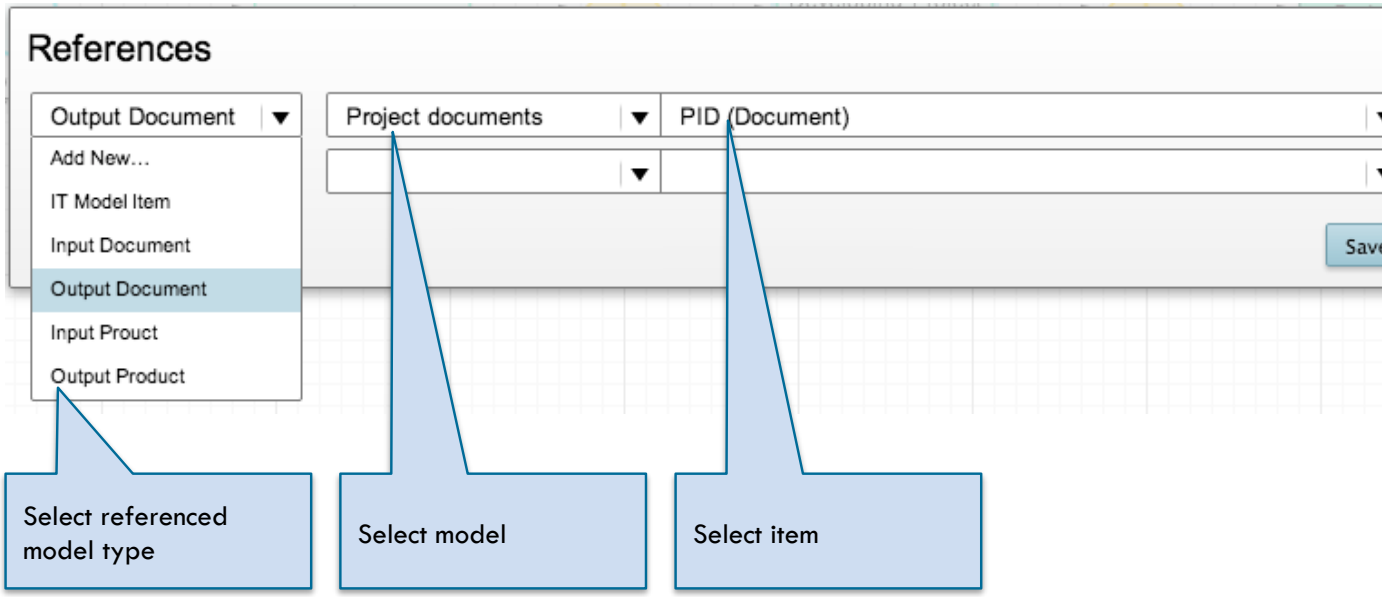


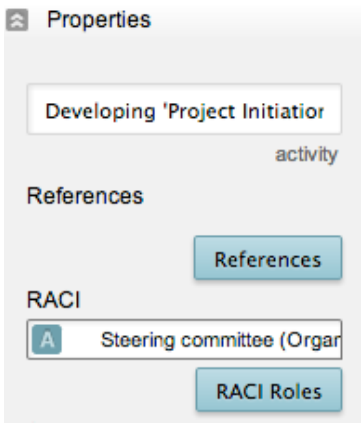
Using References

Applied references will be displayed under “References” section with the icon of the reference type, and indicating input and output references. You can select more than one reference in the same type.

To add a new reference:

1) Click on the references button in the properties window, while an activity is selected in the proces model
2) Select reference type
3) Select model type
4) Select the referenced item



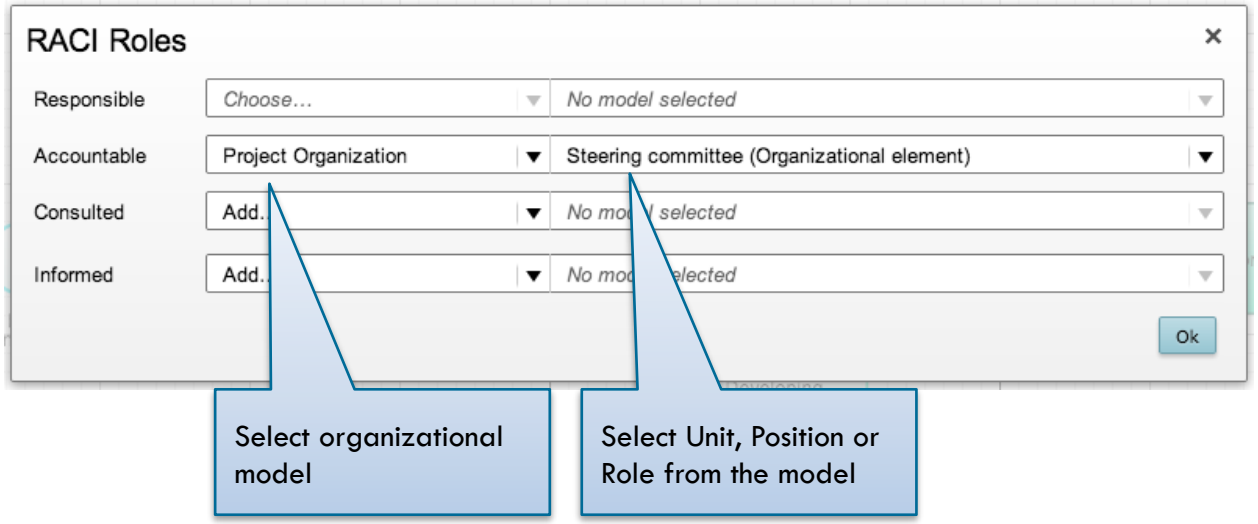


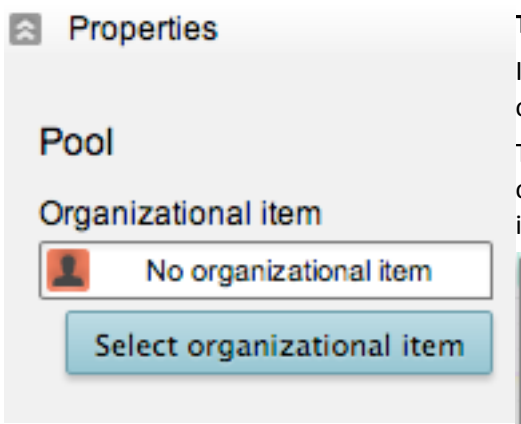
Applying RACI roles

RACI settings will be displayed under "RACI" section with the icon of the responsibility type:

- R – Responsible for execution of an activity. You can select only one organizational player for responsibility.
- A – Accountable for the results of an activity (ownership, quality control). You can select only one organizational player for accountability.
- C – Consulted during performing an activity (request for information)
- I – Informed, aka. receiving information about the execution of an activity.

To add a new RACI role, please click on the "RACI Roles" button, then select the organizational model and the Unit/Position/Role element.

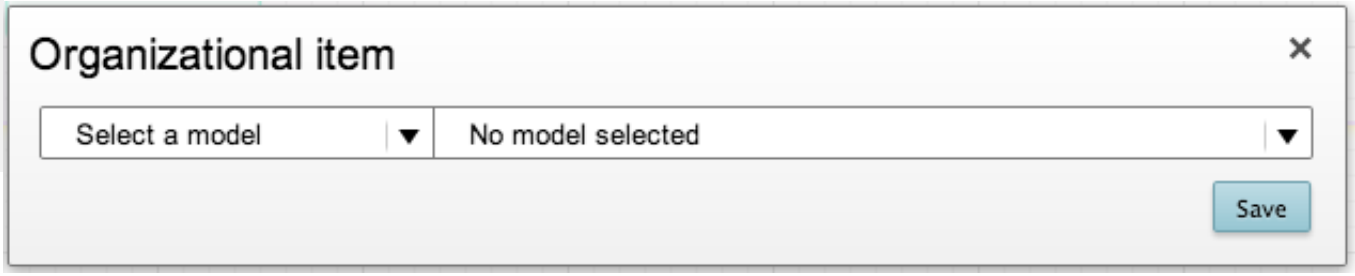


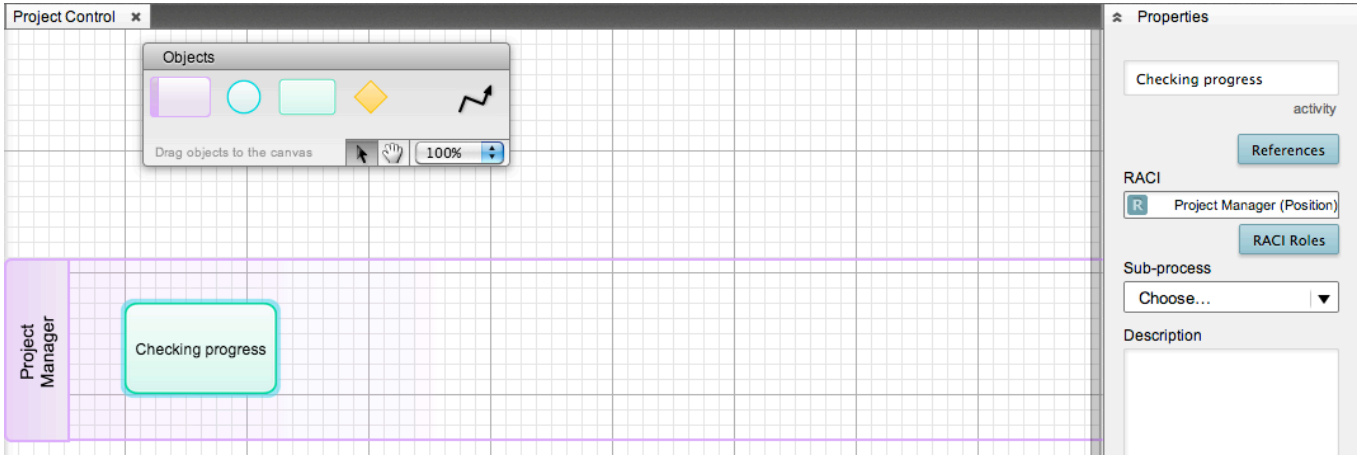


To set responsible roles automatically through pools

If you use organizational pools, and if you place an activity in a pool, the organizational reference of the pool (e.g. organizational unit, a position or a role) will be associated with an activity in “RACI Roles” as Responsible role.

To associate and organizational model item with a pool, select the pool item, and in the properties window click on the “Select organizational item” button, the select the required organizational item and the organizational item you want to apply. The name of the item will be appear on the left side of the pool.





MERGE MODEL

Model elements

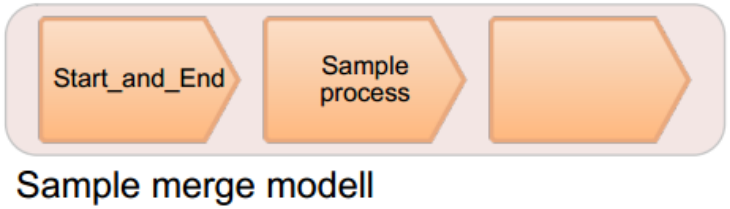
Model object	Description
	Add Models: You can place this object on the canvas. Every time you click on the "+" sign, you can add a new reference. In the properties box you can specify references to a process, or to another merge model.
	Reference object: After you added a new reference object, you can select the referred process or merge model in the properties window. You can delete every reference you placed already.

Sample models

Sample Merge Model

Please note, that the "Add button" disappears in the printed version.

: in Pruexx

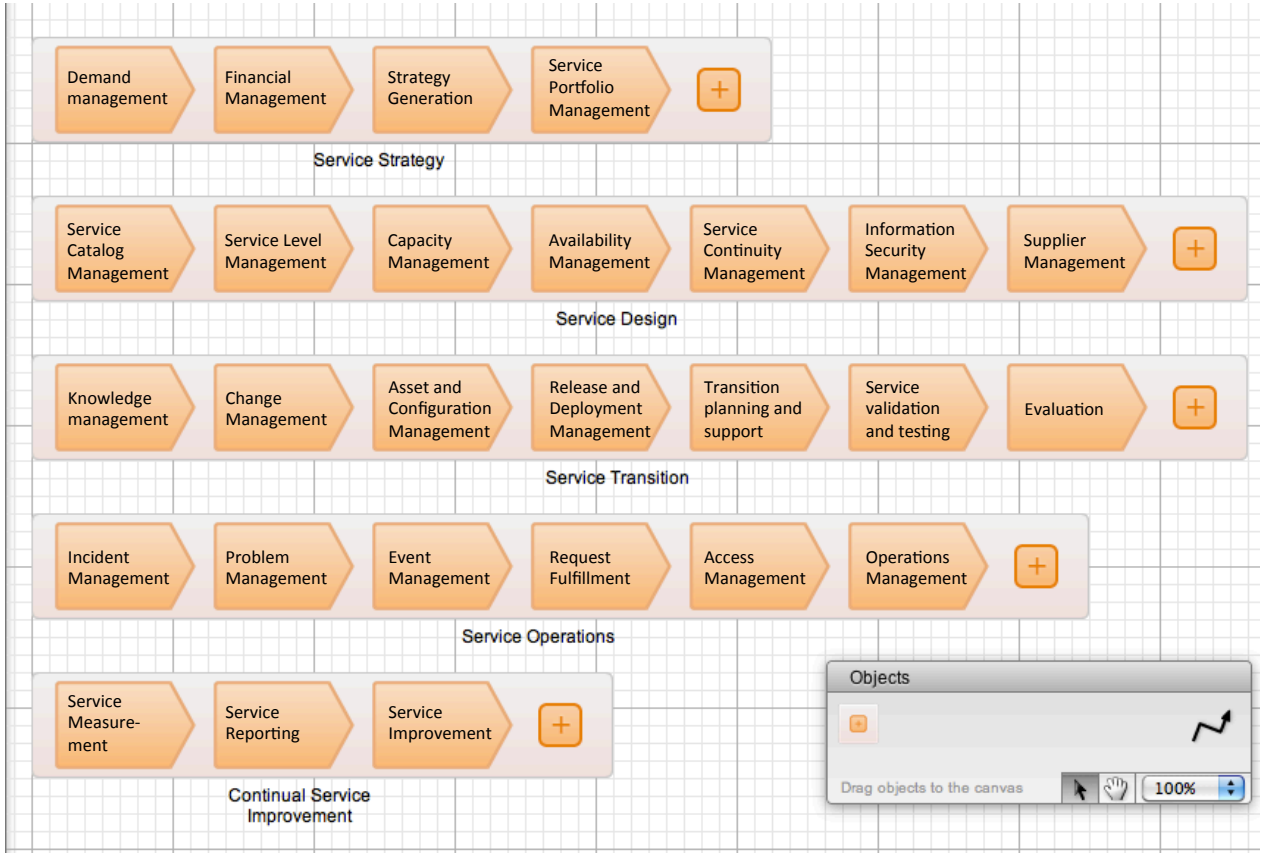


: in Export or Pring

Sample Merge model covering ITIL

ITIL (IT Infrastructure Library) consists of 5 books, and each book describes several processes.

In this merge model each book has its own merge model, and having references to the actual processes or process groups.



ORGANIZATIONAL CHART

In order to be able to define responsibilities in a process model, first the organizational chart have to be created. Elements of organizational models can be used in the RACI matrix.

Model elements

Model object	Description
	Organizational unit: Marking divisions, units, departments, etc.
	Position: Every person in a position can have one or more role(s). Every position should belong to one or more organizational unit (e.g. matrix organizations).
	A Role describes a job-description in a position.

Sample models

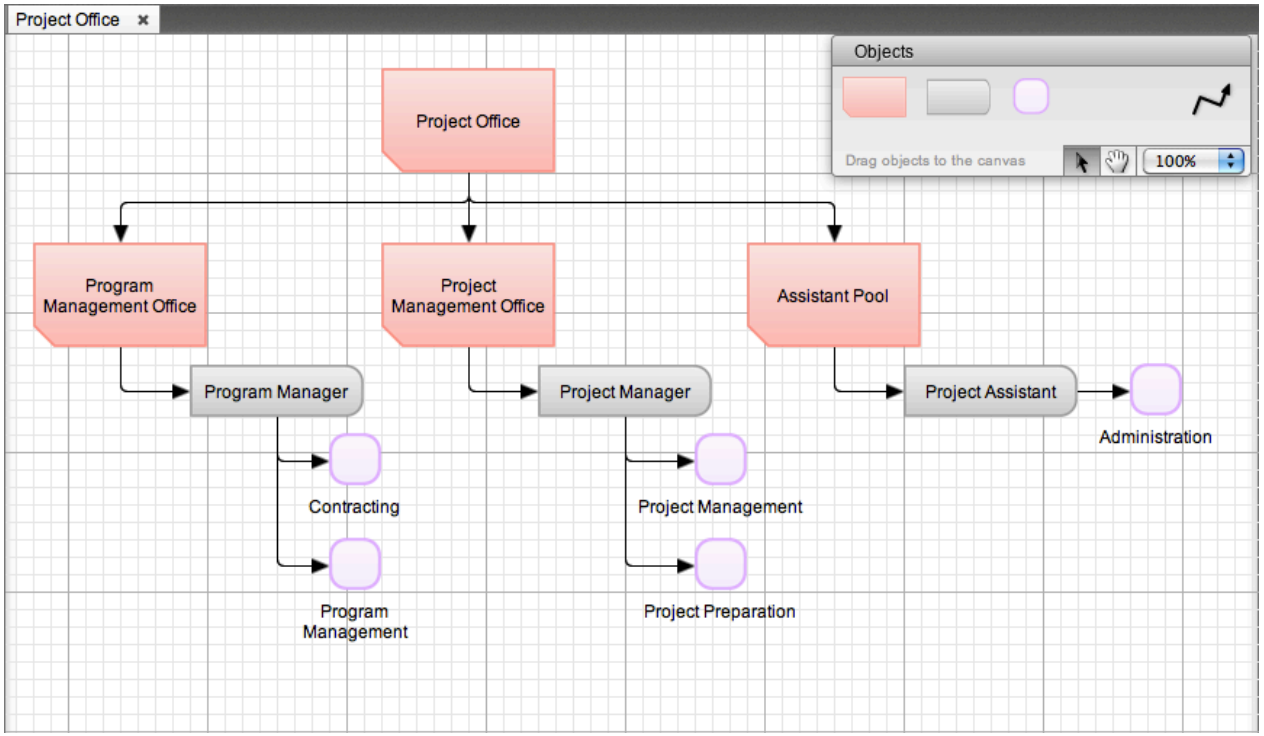
Project Office

The following example describes the top level structure of a corporate project office. The office consists of program managers (responsible for several, but strongly interrelated projects), project managers, and assistants.

Please note, that a person can hold several positions in a company, and in each position can have several roles, responsibilities.

If you want to use a simple approach, you can stop at the position level.

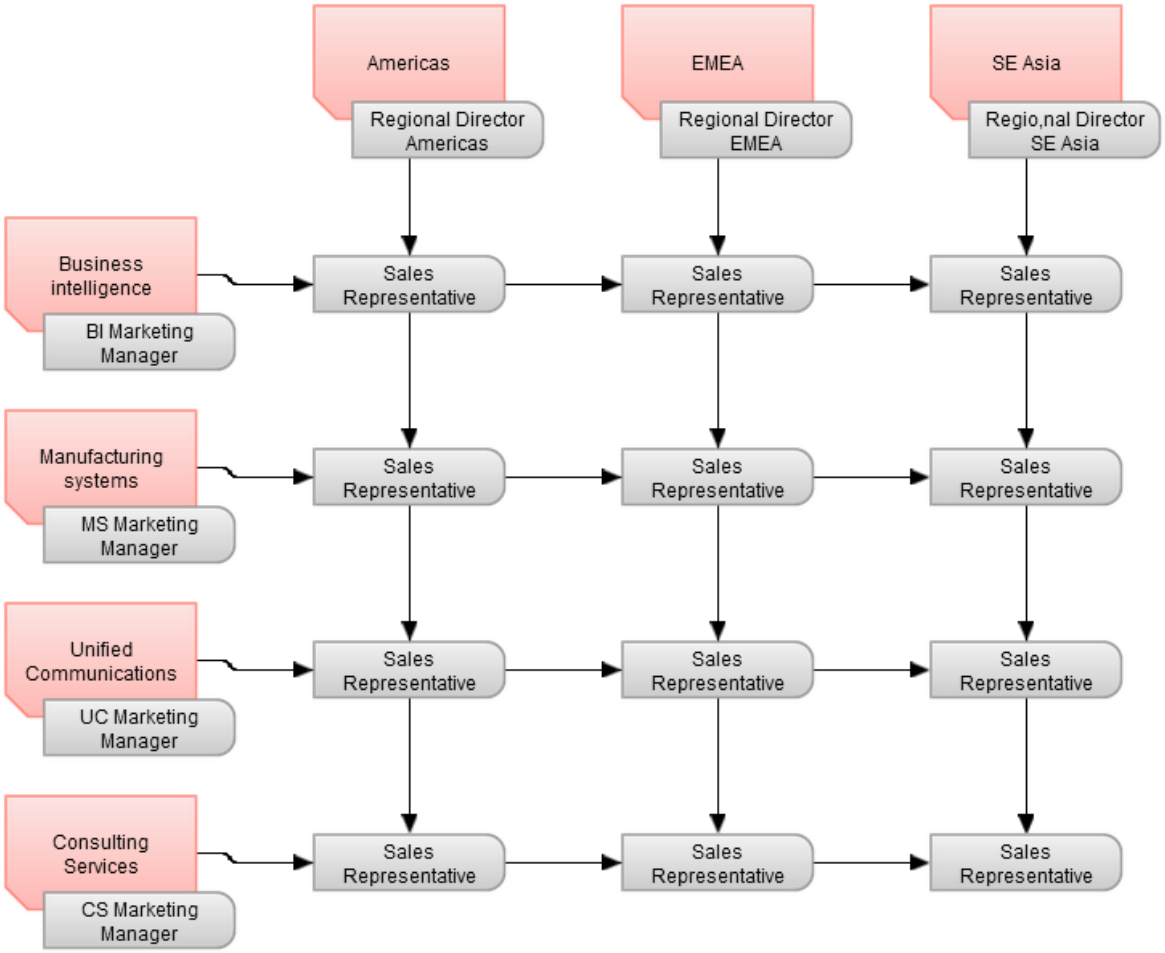
If you want to describe the roles and responsibilities of each position, use roles.



Matrix organization

In Pruexx you are able to model complex orgagnisational structures, you do not need to compromise.

In this matrix organization a Sales Representative reports to both the regional director and the business line manager.



IT MODEL

Model elements

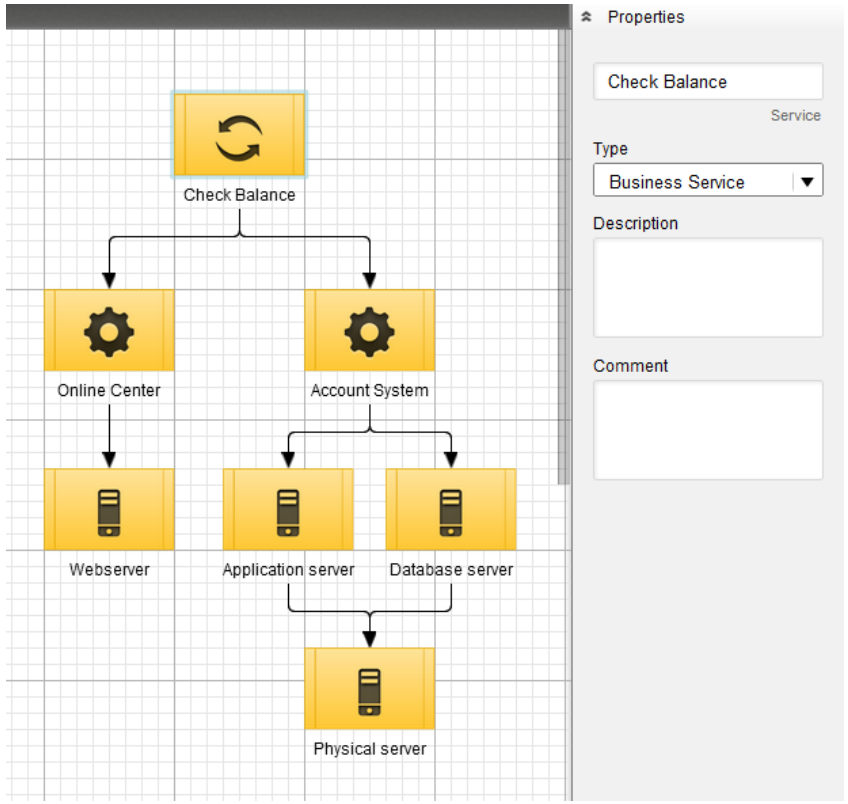
Model object	Description
	Service: IT and business services
	Applications, application modules, software
	Infrastructure elements, hardware, eg. servers, storages

Architecture model

This model describes the components of an online business service: check balance.

It requires an online application that runs on a webserver. The functionality is provided by a backend system (account system) that uses an application server and a database server. Both servers are virtual, and run on the same physical server.

Please note, the figure presents the property box for a service, where you can set the service type.



DOCUMENT MODEL

Model elements

Model object	Description
	Documents: Document can be organized as a collection of sub-documents.

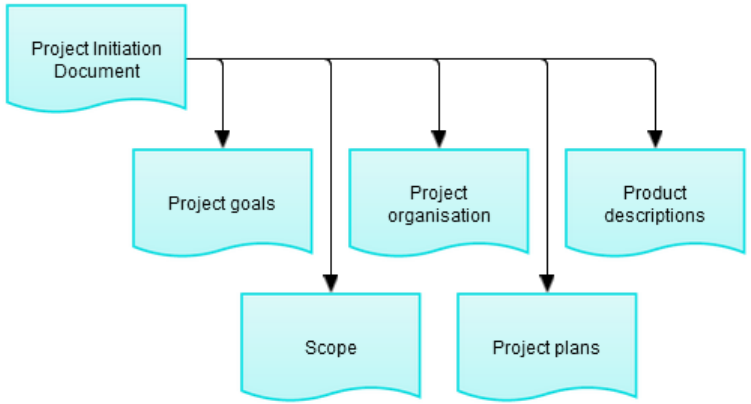
Sample models

Project Initiation Document

The documents consists of 5 main parts, that can be managed separately:

- Project goals
- Scope
- Project organization
- Project Plans
- Product description

Please note, that each element can be used as input or output document reference for an activity in business process models-



PRODUCT MODEL

Model elements

Model object	Description
	Product: Products can be organised as a collection of sub-documents.

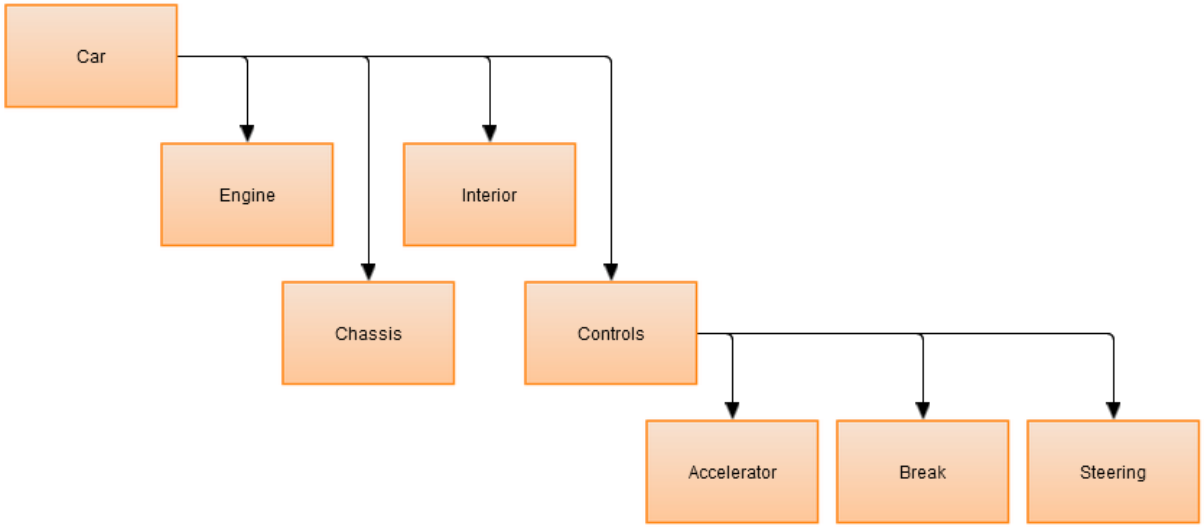
Sample models

Car product breakdown

The car consists of 3 main parts, that can be managed separately:

- Engine
- Chassis
- Interior
- Controls (that is divided into 3 additional parts)

Please note, that each element can be used as input or output p reference for an activity in business process models-

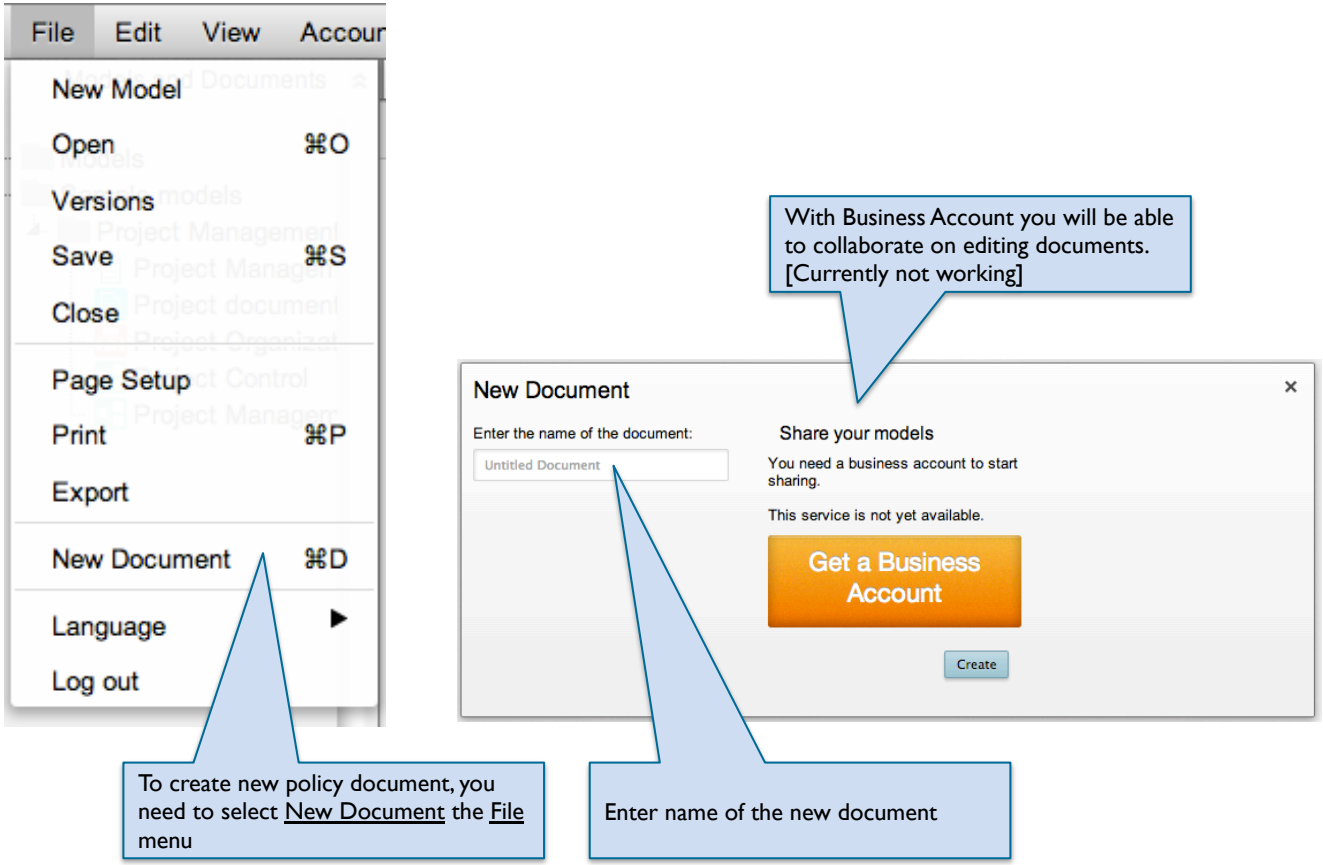


CREATING A POLICY DOCUMENT

Create new document

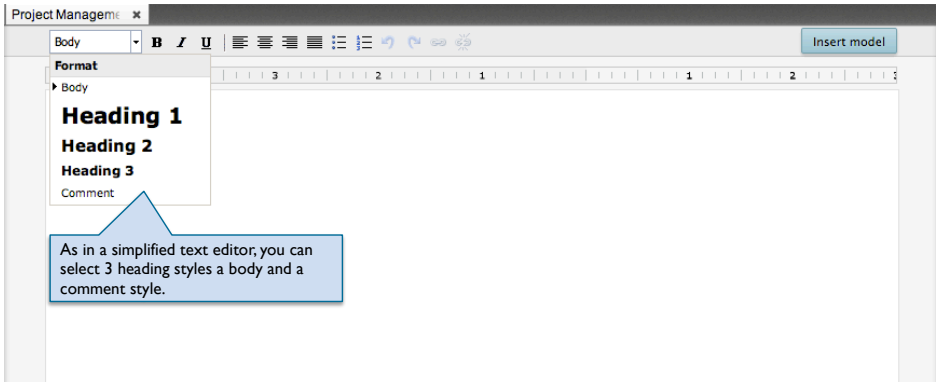
You defined an organizational structure, and specific processes for a domain, and now you would like to have a summary of everything, a policy document to publish and share.

In the 'File' menu please select 'New Document' and enter the name of the new document.



Document editor

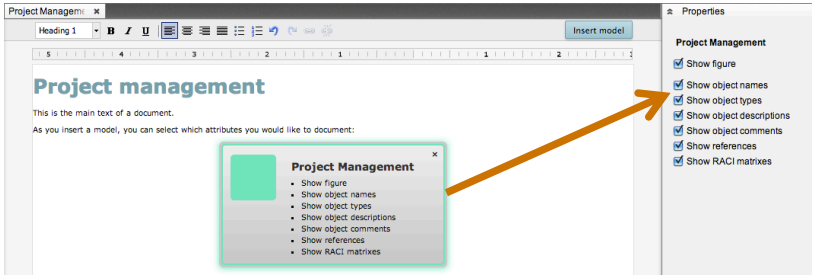
Documents are regular documents, editable by a simplified text editor. In the text editor you can use 3 levels of headings, and basic paragraph formatting tools.

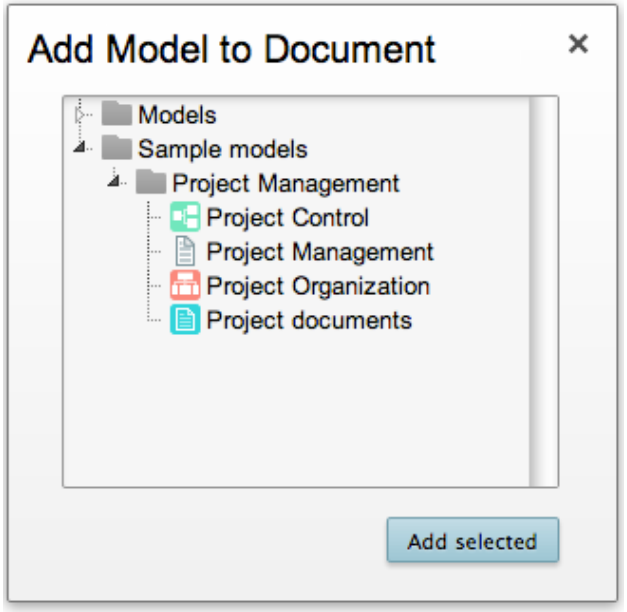


Insert existing models into documents

To include a model in the final documentation, click on the 'Insert model' button, on the top right corner of the text editor. You should select models from the 'Models and Documents' structure.

As inserting a model, you can select which information should be appeared in the document from the referenced model (e.g. in case of process model: model name-automatic, figure, object names and types, descriptions, comments, references and RACI matrixes). You can check and uncheck these options in the properties window when an inserted model is selected.

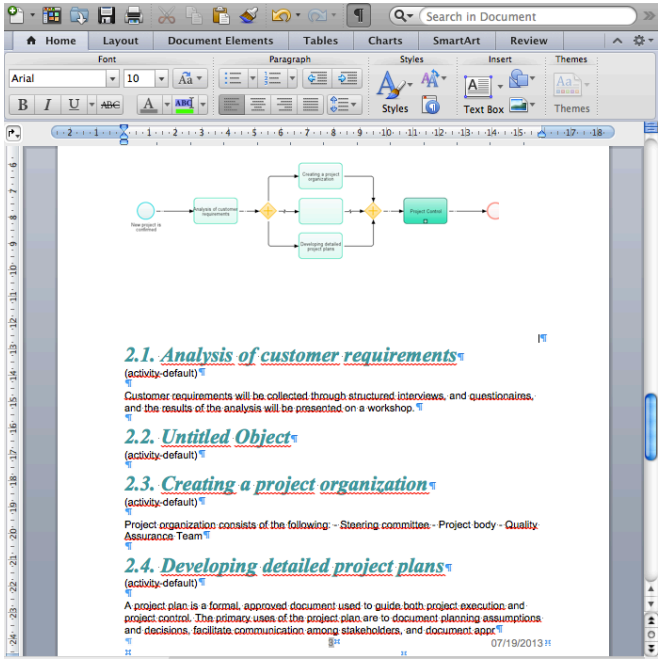




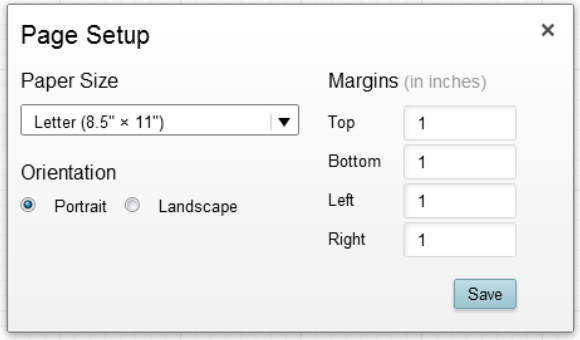
Export documents

You can export documents in Word and PDF formats, by clicking ont he „PDF” or „Word” buttons in the properties window, if an inserted model is not selected.

Word files are available for further editing.


Search in Document
Home
Layout
Document Elements
Tables
Charts
SmartArt
Review
Font
Paragraph
Styles
Insert
Themes
Arial
10
Styles
Text Box
Themes
2.1. Analysis of customer requirements
(activity-default)
Customer requirements will be collected through structured interviews, and questionnaires, and the results of the analysis will be presented on a workshop.
2.2. Untitled Object
(activity-default)
2.3. Creating a project organization
(activity-default)
Project organization consists of the following: - Steering committee - Project body - Quality Assurance Team
2.4. Developing detailed project plans
(activity-default)
A project plan is a formal, approved document used to guide both project execution and project control. The primary uses of the project plan are to document planning assumptions and decisions, facilitate communication among stakeholders, and document appr
07/19/2013

Page Setup



To Setup a page you can select the paper size, orientation and margins.

To change settings please select the file menu, and Page Setup.

Print or export

You can export your models into a portable PDF format. If your browser supports, selecting print, the print window will appear.

Select multiple elements

To select multiple elements in a model you can use the selective marker (click and hold left mouse button to start selecting).

In addition you can hold SHIFT, and click to select the desired elements.

Drawing connectors

After you have drawn a connector, do not forget to change back to the selector tool to add new objects, move objects, add text to objects, etc.

MORE TO COME

Currently planned functions:

- Best practice shop: you can browse, select and buy best practices for ISO 900x, MOF, ITIL/ISO 20000, SOX, etc.
- Corporate account and administration
- Corporate collaboration
- Training videos
- Tailor made templates for organizational branding
- Online consulting